

Allendale County Base Labor Market Analysis



South Carolina
Department of
Commerce
Labor Market Information



November 2008

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EXECUTIVE SUMMARY

Population

Allendale County's population has decreased in recent years.

Future growth is expected to be slower than the state's.

Less than a third of Allendale County's workers live within the county.

A significant number come from Barnwell County.

Income

Per capita income growth has been faster than in the state and nation, but this is due to population declines.

Allendale County's per capita income remained below state and national levels from 1996 to 2006.

Allendale County's average wages are higher than the state's for the protective service occupation group.

Education

The number of degrees awarded by area post-secondary institutions has increased.

The greatest increase has been in the area of healthcare.

Occupations

The following occupational groups are expected to have faster growth in Allendale County than in the state:

Business and financial operations; computer and mathematical science; life, physical and social science; legal; education, training and library; arts, design, entertainment, sports and media; healthcare support; building and grounds cleaning and maintenance; personal care and service; farming and forestry; and construction and extraction.

Requirements for Allendale County's workers are expected to grow in the following levels of education and experience:

Long-term on-the-job training, work experience in a related field, postsecondary vocational award, bachelor's degree, and master's degree or higher.

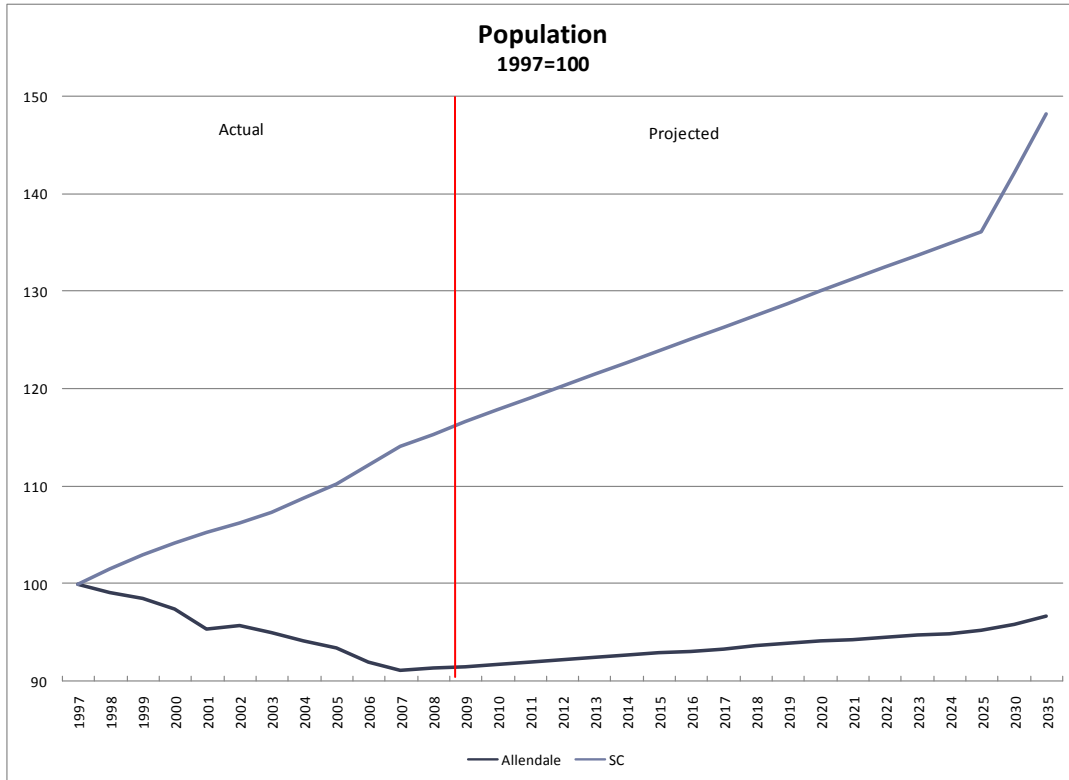
Industry

Industry data is quite limited for Allendale County. Of the sectors for which data was available, ambulatory health care services was the only one with above-average wages for which growth was expected.

POPULATION

Growth

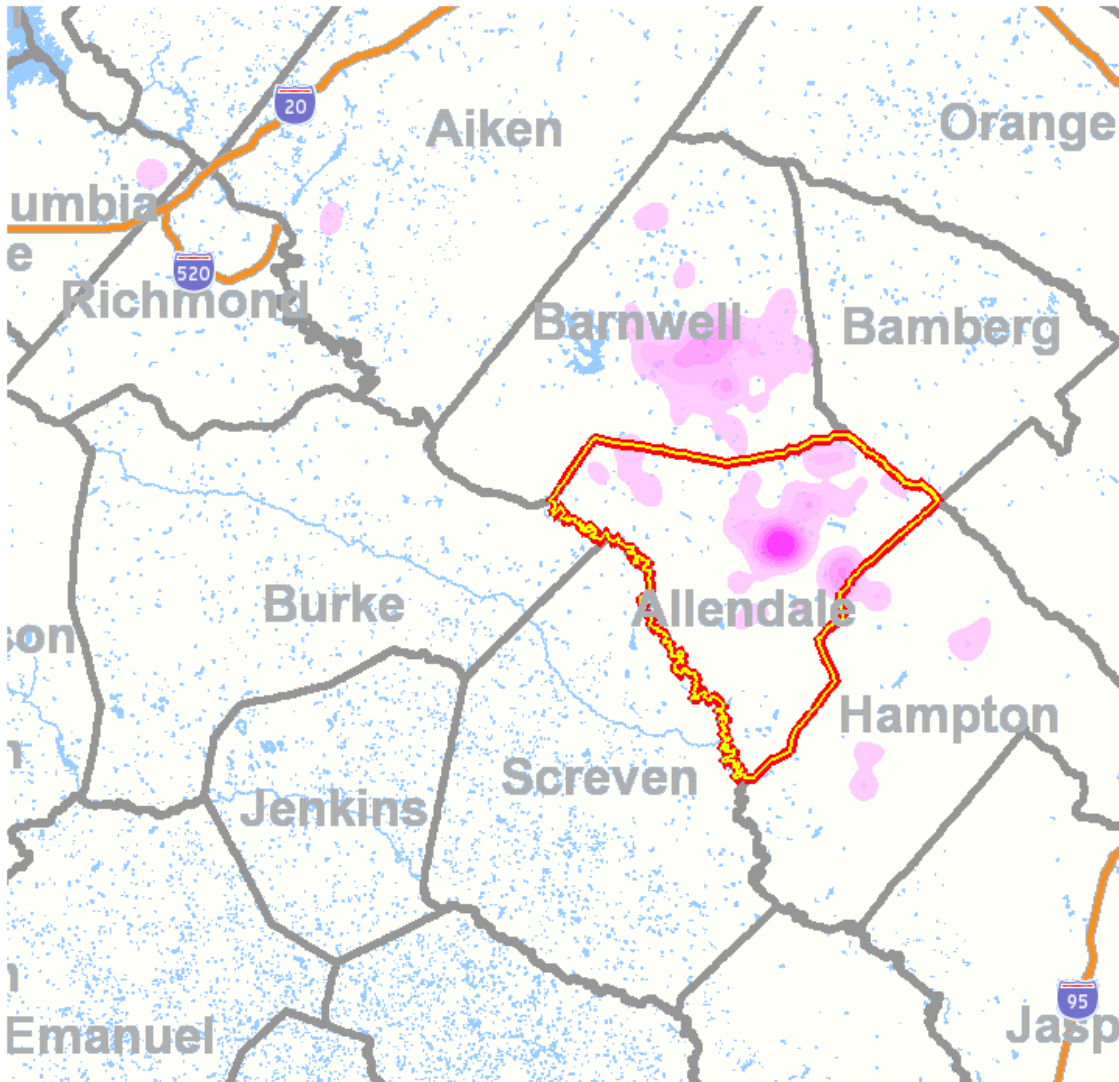
Allendale County's 2007 population was 10,475. The county population has fallen by 8.8% since 1997, compared to 14.2% growth for South Carolina. Allendale's future population growth is expected to be slower than the state's.



Source: U.S. Census Bureau (estimates) and SC Budget & Control Board/Office of Research and Statistics (projections).

LABORSHED

The map below shows where Allendale County workers come from (in 2006, latest available data). Allendale County draws less than a third of its workers from within its borders, with a significant number coming from Barnwell County.



Source: U.S. Census Bureau, Local Employment Dynamics.

Characteristics of Workers

Age of Workers:

30 or younger	19.0%
31 to 54	62.4%
55 or older	18.6%

Earnings of Workers:

\$1,200 per month or less	23.7%
\$1,201 to \$3,400 per month	41.7%
More than \$3,400 per month	34.6%

States Where Workers Live:

South Carolina	91.6%
Georgia	6.5%
All other locations	1.9%

Counties Where Workers Live:

Allendale	31.4%
Barnwell	21.7%
Aiken	7.6%
Hampton	7.1%
Richland	3.6%
Lexington	2.9%
Orangeburg	2.7%
Colleton	2.4%
Richmond (Georgia)	2.4%
Bamberg	2.1%
All Other Locations	16.3%

Cities Where Workers Live:

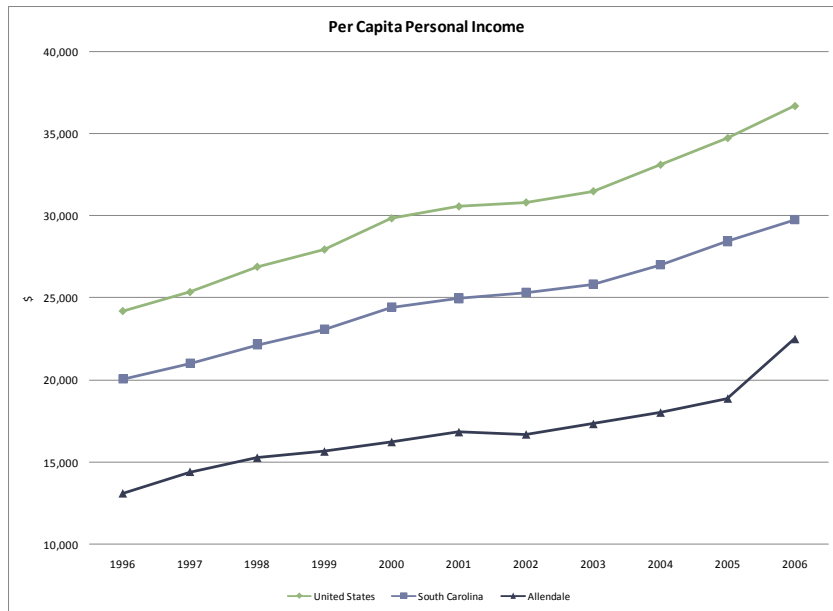
Allendale, South Carolina	15.5%
Barnwell, South Carolina	5.7%
Fairfax, South Carolina	4.0%
Augusta-Richmond County (balance), Georgia	2.4%
Williston, South Carolina	1.5%
Aiken, South Carolina	1.4%
Columbia, South Carolina	1.2%
Hampton, South Carolina	1.0%
Estill, South Carolina	0.9%
Martinez, Georgia	0.9%
All Other Locations	65.6%

Source: U.S. Census Bureau, Local Employment Dynamics.

INCOME

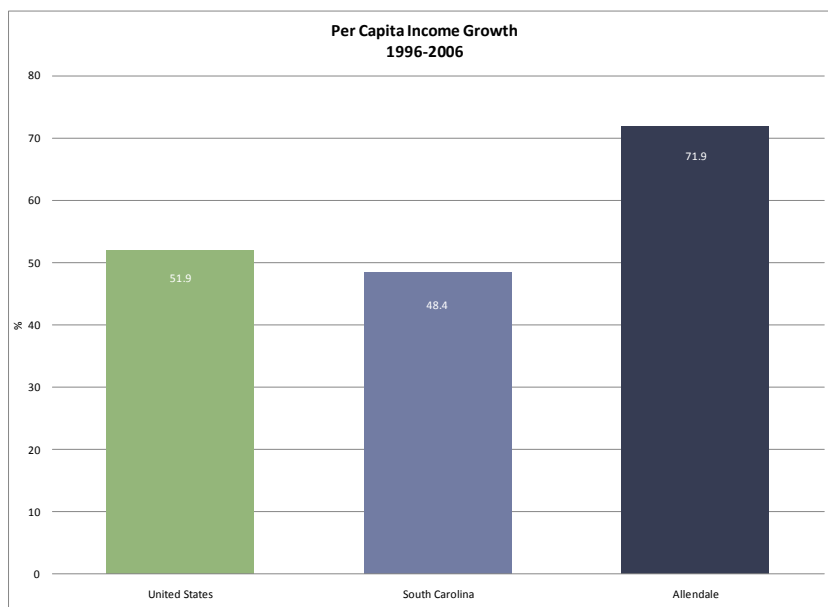
Per Capita Income

Allendale County's per capita income has remained below state and national levels.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Allendale County's per capita income has grown much faster than South Carolina's and the nation's. However, that growth is due to Allendale's population decline. Allendale's personal income growth was below average.



Source: U.S. Department of Commerce, Bureau of Economic Analysis.

Wages by Industry

Allendale County's average wages are equal to those of South Carolina (\$680 in 2007). Average wages were up 27% in Allendale County over the past five years, compared to 18% for the state. All major sectors for which data was available had growth.

Industry	NAICS Code	2007 Average Weekly Wage (\$)	2002 Average Weekly Wage (\$)	% Change
Total, Private and Government		680	536	27
Construction	23	1,146	443	159
Manufacturing	31-33	687	580	18
Retail Trade	44-45	321	241	33
Transportation and Warehousing	48-49	NA	NA	
Information	51	NA	293	
Finance and Insurance	52	NA	NA	
Real Estate and Rental and Leasing	53	NA	NA	
Administration & Support & Waste Management & Remediation Services	56	502	NA	
Arts, Entertainment, and Recreation	71	NA	282	
Accommodation and Food Services	72	NA	251	
Other Services (Except Public Administration)	81	NA	225	
Federal Government		740	595	24
State Government		650	635	2
Local Government		496	439	13

Source: U.S. Department of Labor, Bureau of Labor Statistics, Quarterly Census of Employment and Wages.

Wages by Occupation

Average wages in Allendale County are higher than the state average in the protective service occupational group.

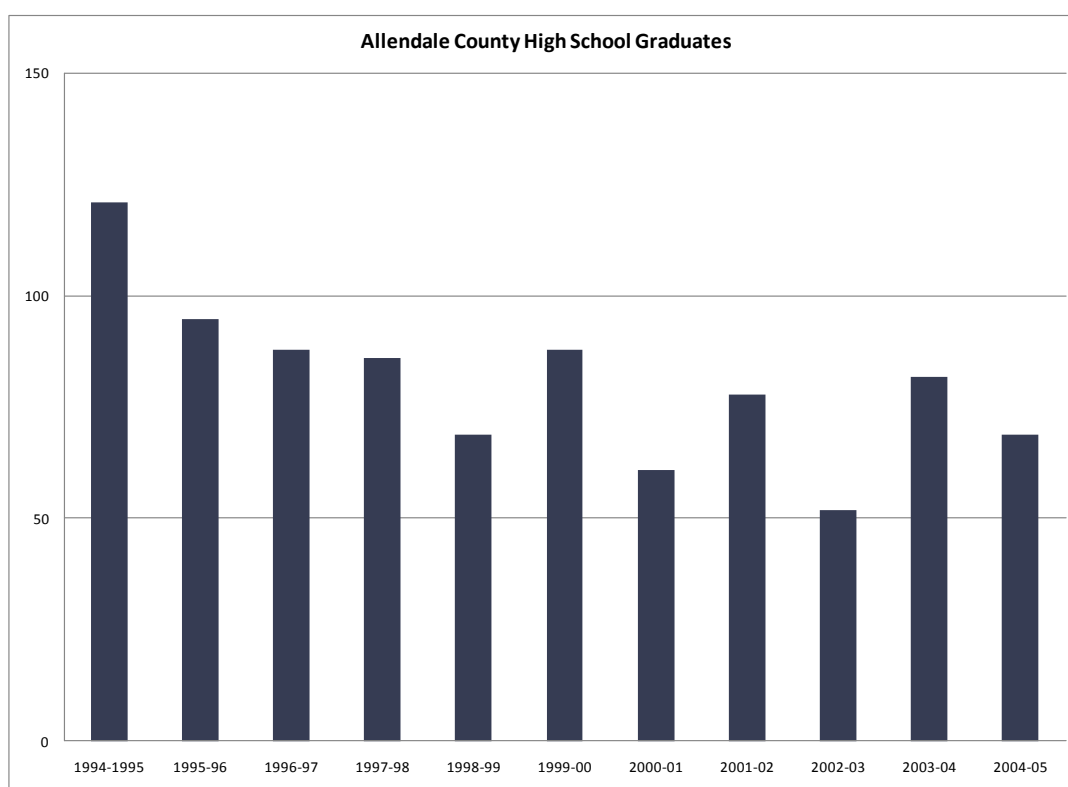
Occupation	2007 Allendale County Median Hourly Wage (\$)	2007 SC Median Hourly Wage (\$)
Management occupations	11.36	28.78
Business and financial operations occupations	11.52	20.28
Computer and mathematical science occupations	16.14	26.20
Architecture and engineering occupations	16.89	30.22
Life, physical and social science occupations	12.81	22.76
Community and social services occupations	12.82	13.18
Legal occupations	15.06	30.68
Education, training and library occupations	21.27	24.42
Arts, design, entertainment, sports and media occupations	7.75	12.66
Healthcare practitioners and technical occupations	21.25	30.64
Healthcare support occupations	7.37	10.55
Protective service occupations	13.96	13.87
Food preparation and serving related occupations	7.36	7.90
Building and grounds cleaning and maintenance occupations	7.11	8.42
Personal care and service occupations	7.18	8.39
Sales and related occupations	8.22	13.48
Office and administrative support occupations	9.37	13.22
Farming, fishing, and forestry occupations	10.83	13.07
Construction and extraction occupations	12.21	16.51
Installation, maintenance and repair occupations	11.72	16.88
Production occupations	10.91	15.21
Transportation and material moving occupations	10.28	12.94

Source: *Economic Modeling Specialists, Inc.*

EDUCATION

High School Graduates

From 1995 to 2005 (latest data available), the number of Allendale County students receiving high school diplomas fell by 52 (43%). In South Carolina, on the other hand, the number of high school diplomas increased 9% from 1995 to 2005. A total of 69 people received high school diplomas in Allendale County in 2005. Allendale County had 60 fewer 12th grade students in 2004-05 than in 1994-95. Also, the number of Allendale County students not passing the exit exam who received a certificate of completion instead of a diploma was up by 1 (at 10) over the 1995-2005 period.



Source: National Center for Education Statistics.

Higher Education Graduates

Over 1,000 more students graduated from higher educational institutions in the Lower Savannah area in 2006 than in 1996, an increase of 33%. The greatest numerical increase was in the healthcare field.

Program	1996	2006	Change	% Change
Health professions and related clinical sciences	744	1,143	399	54
Liberal arts and sciences, general studies and humanities	202	330	128	63
Mechanic and repair technologies/technicians	206	320	114	55
Computer and information sciences and support services	131	212	81	62
Family and consumer sciences/human sciences	67	147	80	119
Business, management, marketing, and related support services	586	650	64	11
Multi/interdisciplinary studies	42	102	60	143
Biological and biomedical sciences	58	116	58	100
Engineering technologies/technicians	129	181	52	40
Communication, journalism, and related programs	1	47	46	4,600
Parks, recreation, leisure, and fitness studies		44	44	
Psychology	46	83	37	80
Legal professions and studies	78	109	31	40
Visual and performing arts	12	42	30	250
Theology and religious vocations	4	31	27	675
Philosophy and religious studies	1	3	2	200
Engineering		1	1	
Social sciences and history	97	98	1	1
Physical sciences	19	19	0	0
Public administration and social service professions	93	92	-1	-1
Science technologies/technicians	6	5	-1	-17
English language and literature/letters	49	45	-4	-8
Natural resources and conservation	5	0	-5	-100
Agriculture, agriculture operations, and related sciences	16	4	-12	-75
Mathematics and statistics	39	25	-14	-36
Construction trades	31	12	-19	-61
Precision production	66	45	-21	-32
Security and protective services	161	136	-25	-16
Education	350	246	-104	-30
TOTAL	3,240	4,305	1,065	33

Source: National Center for Education Statistics (Integrated Post Secondary Education System).

Data for these schools: Aiken Technical College, Claflin University, Midlands Technical College, Orangeburg-Calhoun Technical College, South Carolina State University, Southern Methodist College, and USC-Aiken.

OCCUPATIONS

Occupational Projections

The following occupational groups are projected to grow faster in Allendale County than in the state:

- Business and financial operations and media
- Computer and mathematical science
- Life, physical and social science
- Legal
- Education, training and library
- Arts, design, entertainment, sports
- Healthcare support
- Building and grounds cleaning and maintenance
- Personal care and service
- Farming and forestry
- Construction and extraction

See **Appendix A** for detailed occupational information.

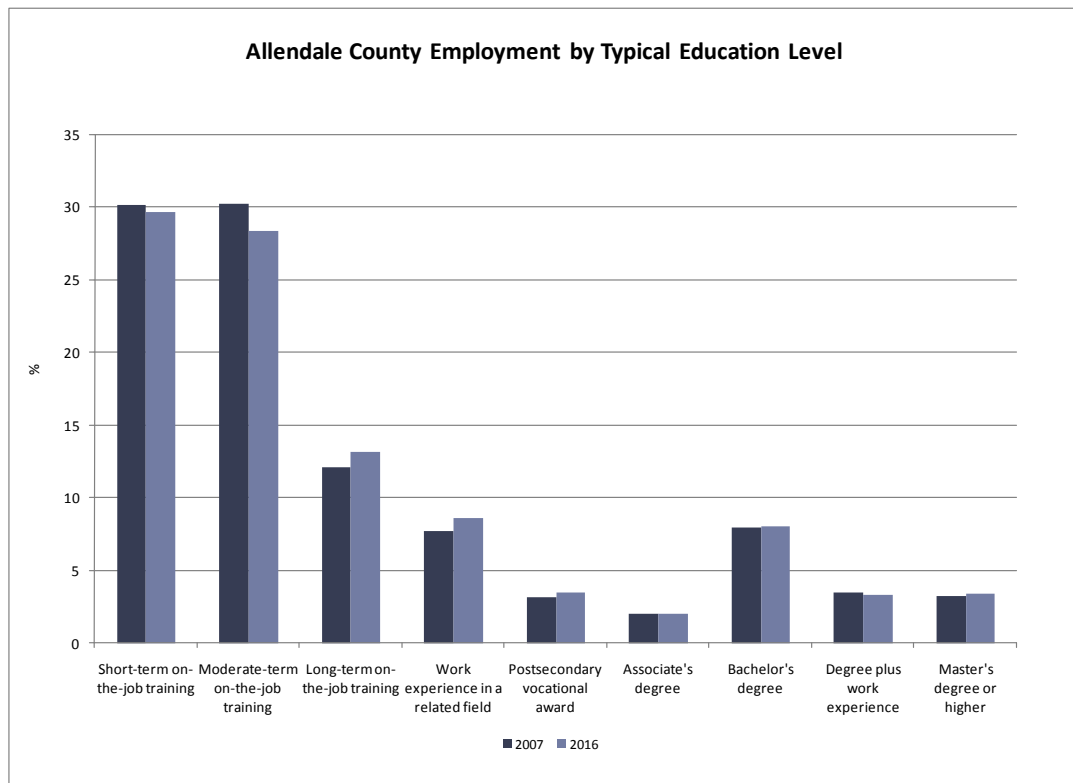
Occupation	2007-2016 Allendale County Projected Growth (%)	2007-2016 SC Projected Growth (%)
Management occupations	14	17
Business and financial operations occupations	24	22
Computer and mathematical science occupations	28	23
Architecture and engineering occupations	0	15
Life, physical and social science occupations	25	15
Community and social services occupations	15	15
Legal occupations	41	21
Education, training and library occupations	23	16
Arts, design, entertainment, sports and media occupations	25	17
Healthcare practitioners and technical occupations	19	24
Healthcare support occupations	35	25
Protective service occupations	12	18
Food preparation and serving related occupations	13	13
Building and grounds cleaning and maintenance occupations	36	23
Personal care and service occupations	32	7
Sales and related occupations	19	19
Office and administrative support occupations	8	13
Farming, fishing and forestry occupations	25	16
Construction and extraction occupations	21	19
Installation, maintenance and repair occupations	1	17
Production occupations	-29%	10
Transportation and material moving occupations	-1%	11

Source: *Economic Modeling Specialists, Inc.*

Occupational Education Requirements

The trend for occupational growth shows that there will be growth in jobs across skill levels. Based on employment projections, Allendale County is expected to see growth in requirements for the following specific levels of education and experience:

- Long-term on-the-job training
- Work experience in a related field
- Postsecondary vocational award
- Bachelor's degree
- Master's degree or higher



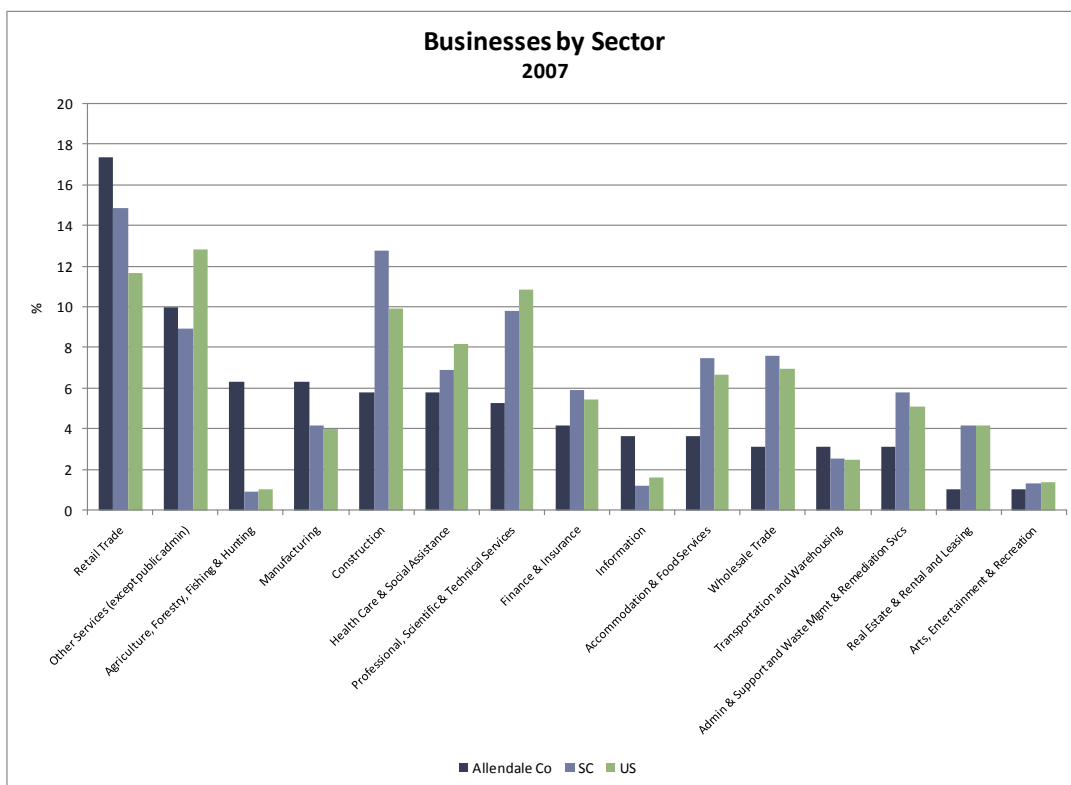
Source: Economic Modeling Specialists, Inc

INDUSTRY

Businesses by Sector

Allendale County had higher percentages of businesses than South Carolina or the nation in the following sectors:

- Retail trade
- Agriculture and forestry
- Manufacturing
- Information
- Transportation and warehousing



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Growth in Number of Businesses

The number of private businesses in Allendale County fell by 18% from 2002 to 2007, compared to a 2% drop for the state. For industry definitions, this analysis uses the North American Industry Classification System (NAICS), the U.S. standard for industry classification.

At the three-digit NAICS code level, based on available data, Allendale County had higher growth in three industries compared to South Carolina and the U.S. Below is a list of those three industries along with their respective growth rates.

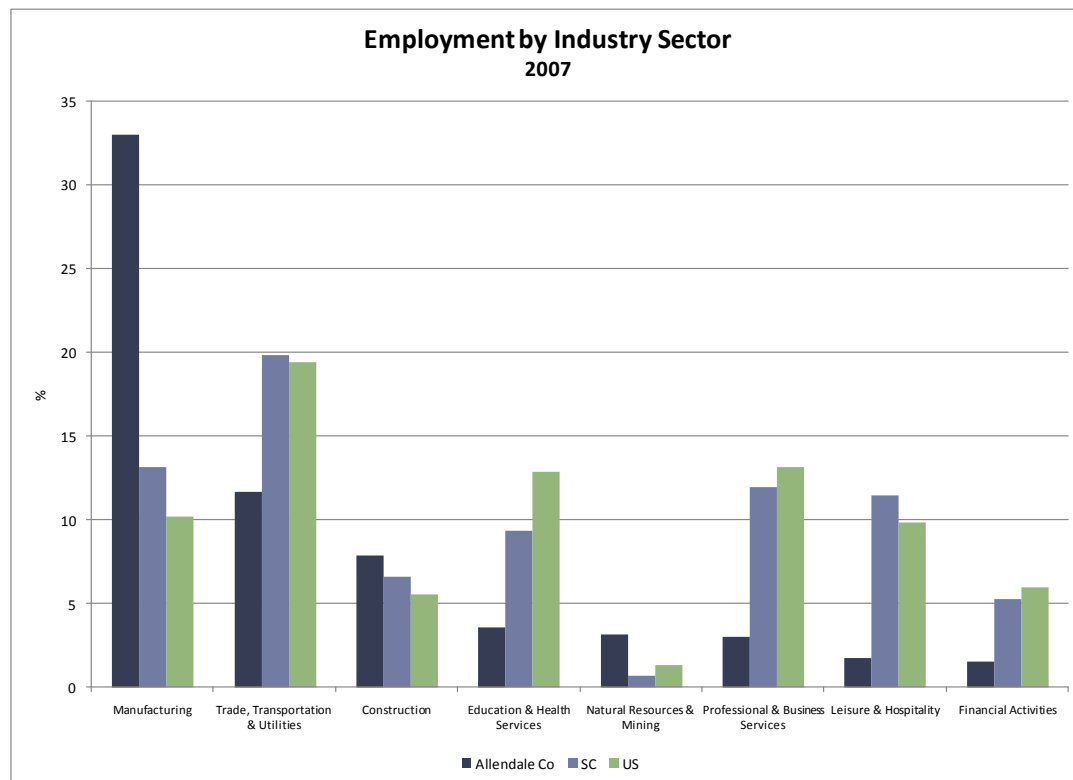
See **Appendix B** for information on all industries.

Industry	2002-2007 Growth (%)		
	Allendale Co.	SC	US
Crop production	33.3	-17.6	-9.3
Miscellaneous store retailers	33.3	-23.9	-8.6
Credit intermediation and related activities	40.0	12.2	23.8

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Employment by Sector

Allendale County has a larger than average share of its jobs in manufacturing, construction, and natural resources and mining.



Source: U.S. Department of Labor, Bureau of Labor Statistics.

Industry Analysis

Screening Criteria

Industry sectors were rated on six factors:

- | | |
|------------------------------------|---------------------------------|
| • 2002-2007 employment growth | Competitive effect ¹ |
| • 2002-2007 employment growth rate | Average annual wage |
| • Location quotient ² | Projected growth |

Using those factors, sectors were awarded “stars” based on meeting the following criteria:

- 2002-2007 employment growth of 25 or more (Did the sector add a significant number of jobs?)
- 2002-2007 employment growth rate greater than 0.2% (overall county job growth rate over the period) (Did the sector add jobs at an above-average rate?)
- Location quotient of at least 1.25 (Does the sector have a significant concentration in the county?)
- Competitive effect greater than 0 (Did the sector add jobs beyond national growth overall and in the sector?)
- Average annual wage greater than \$35,358 (2007 average for the county) (Does the sector pay wages greater than average for the county?)
- Average or above average projected growth (Is the sector expected to add jobs?)

Data Limitations

Because of Census and Bureau of Labor Statistics restrictions, information on detailed industry sectors is quite limited for smaller counties such as Allendale. Therefore, this base analysis is not as comprehensive as those for larger areas. Further analysis can be conducted on growth occupations and using other resources in an attempt to obtain more detailed information on potential focus industries for Allendale County. The Department of Commerce can assist in this supplemental analysis.

Industries of Note

Based on these criteria and available data, there are no sectors in Allendale County with more than three “stars.” For sectors for which there was data for Allendale County, ambulatory health care services was the only one with above-average wages for which growth is expected.

Industry sectors that generate wealth from outside the area are referred to as the region’s base economy. Base economy sectors are important to an area’s economic well-being. When considering sectors with potential for Allendale County, consideration should be given to those which fit the base economy criteria.

Appendix C has information on all factors for all sectors for Allendale County.

¹ *Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.*

² *Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county compared to the US; based on 2007 data.*

MOVING FORWARD

The South Carolina Department of Commerce appreciates the opportunity to provide this base analysis of Allendale County's labor market. We hope that it will help in advancing the progress of Allendale County's economic development.

What's been done so far?

This analysis identifies the region's assets—both current and future—at a macro level. Labor Market Information (LMI) at the S.C. Department of Commerce developed a Base Labor Analysis report providing an overview of the region's population, industries, occupations, and educational assets. Additionally, these findings were benchmarked against the state and the nation.

What's next?

Because local knowledge is required to interpret and apply the findings appropriately, the Allendale Base Labor Analysis should be used with local stakeholders to identify and define key, targeted industry clusters. Some items to consider when defining these clusters may include the following.

1. *What is Allendale's economic base?*

In order for an economy to grow, it must have a base (export) sector that generates wealth from beyond its borders. Industries in the economic base (manufacturing, scientific and technology services, warehouse and distribution, financial services, regional healthcare, etc.) typically provide occupations with higher pay and benefits as well as better human capital development and promotion opportunities. A successful economic base stimulates the development of the non-base sector (housing, schools, retail, restaurants, personal services, etc.). It also propels the local tax base which, in turn, provides support to community services.

2. *What are strategies to assist low-wage citizens in non-base economy jobs?*

Although the economic base is the driver for long-term growth in a region, implementable strategies for developing job opportunities for low-skilled individuals is a priority for community economic well-being. This need must also be kept in mind when defining target industry clusters.

3. *What other factors are vital to Allendale and its community?*

Over and above pure economic considerations, what is important to the citizens of the Allendale community? How does Allendale want to be perceived? What quality of life issues affect Allendale? These questions may impact the types of industries desired for the area.

How Labor Market Information at the S.C. Department of Commerce can help.

Once local stakeholders have identified key industry clusters vital to the future economic development of the region, LMI can provide more in-depth analysis of each of these industries, their occupations, business establishments, and educational requirements.

1. Detailed Industry Analysis

For each identified industry, LMI can develop a detailed analysis of each sector, including employment, projected growth, staffing patterns, location quotients, and employers. Additionally, the analysis will examine the largest, fastest growing, and declining sectors within the industry cluster.

2. Detailed Occupational Analysis

At this point, the occupations—classified by SOC codes—that make up each of the identified industry clusters can be analyzed in detail. This analysis will include employment, average earnings, educational requirements, projected growth, and completers from available local training programs. It will culminate in identifying gaps between the number of occupations required to sustain and advance industry growth and the number of skilled workers (as identified by educational requirements and program completers) available to fulfill these positions.

3. Identification of Implementable Recommendations

LMI will utilize the findings of the analyses to develop a set of implementable recommendations. These may include recommendations to align community college programs with economic development goals along with others. Finally, local knowledge will once again be called upon to review the findings and develop an action plan for the implementation of feasible solutions.

Appendix A: Occupational Projections for Allendale County

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
11-9011	Farm, ranch, and other agricultural managers	39	38	-1	-3	2.76	16.18	Degree plus work experience
11-9012	Farmers and ranchers	141	146	5	4	3.01	6.55	Long-term on-the-job training
11-9021	Construction managers	26	54	28	108	1.26	38.08	Bachelor's degree
11-9032	Education administrators, elementary and secondary school	14	16	2	14	1.71	35.38	Degree plus work experience
11-9033	Education administrators, postsecondary	11	14	3	27	2.21	36.02	Degree plus work experience
11-9081	Lodging managers	18	31	13	72	4.38	13.51	Work experience in a related field
11-9141	Property, real estate, and community association managers	14	23	9	64	0.43	9.71	Bachelor's degree
11-9199	Managers, all other	17	24	7	41	0.39	9.08	Work experience in a related field
11-1011	Chief executives	21	28	7	33	0.67	40.10	Degree plus work experience
11-1021	General and operations managers	43	55	12	28	0.88	69.82	Degree plus work experience
13-2011	Accountants and auditors	30	42	12	40	0.70	24.47	Bachelor's degree

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
15-1041	Computer support specialists	10	13	3	30	0.66	14.87	Associate's degree
21-1012	Educational, vocational, and school counselors	11	13	2	18	1.55	18.94	Master's degree
21-1021	Child, family, and school social workers	22	25	3	14	2.71	13.33	Bachelor's degree
23-1011	Lawyers	11	21	10	91	0.45	31.16	First professional degree
25-1099	Postsecondary teachers	79	105	26	33	1.81	35.26	Doctoral degree
25-2012	Kindergarten teachers, except special education	14	16	2	14	2.58	21.05	Bachelor's degree
25-2021	Elementary school teachers, except special education	81	96	15	19	1.80	22.03	Bachelor's degree
25-2022	Middle school teachers, except special and vocational education	23	27	4	17	1.18	21.64	Bachelor's degree
25-2031	Secondary school teachers, except special and vocational education	49	54	5	10	1.63	23.70	Bachelor's degree
25-3099	Teachers and instructors, all other	29	33	4	14	1.63	7.67	Bachelor's degree
25-9041	Teacher assistants	48	54	6	13	1.24	8.10	Short-term on-the-job training
29-1069	Physicians and surgeons	17	19	2	12	0.71	69.39	First professional degree
29-1111	Registered nurses	64	79	15	23	0.94	25.29	Associate's degree
29-2061	Licensed practical and licensed vocational nurses	22	25	3	14	1.10	19.39	Postsecondary vocational award

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
31-1011	Home health aides	13	22	9	69	0.51	7.77	Short-term on-the-job training
31-1012	Nursing aides, orderlies, and attendants	30	41	11	37	0.75	9.84	Postsecondary vocational award
31-9092	Medical assistants	10	13	3	30	0.83	10.69	Moderate-term on-the-job training
33-3012	Correctional officers and jailers	37	47	10	27	3.25	12.42	Moderate-term on-the-job training
33-3051	Police and sheriff's patrol officers	31	37	6	19	1.93	12.82	Long-term on-the-job training
33-9032	Security guards	56	80	24	43	1.95	13.93	Short-term on-the-job training
35-1012	First-line supervisors/managers of food preparation and serving workers	15	18	3	20	0.61	11.55	Work experience in a related field
35-2011	Cooks, fast food	11	15	4	36	0.69	6.55	Short-term on-the-job training
35-2012	Cooks, institution and cafeteria	21	23	2	10	1.88	6.98	Moderate-term on-the-job training
35-2021	Food preparation workers	11	14	3	27	0.45	6.63	Short-term on-the-job training
35-3021	Combined food preparation and serving workers, including fast food	29	40	11	38	0.41	7.24	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
37-2011	Janitors and cleaners, except maids and housekeeping cleaners	54	58	4	7	0.87	9.45	Short-term on-the-job training
37-2012	Maids and housekeeping cleaners	86	124	38	44	1.47	7.02	Short-term on-the-job training
37-2019	Building cleaning workers, all other	11	14	3	27	0.77	6.56	Short-term on-the-job training
37-3011	Landscaping and groundskeeping workers	22	29	7	32	0.77	10.07	Short-term on-the-job training
39-9011	Child care workers	52	66	14	27	1.03	6.83	Short-term on-the-job training
39-9021	Personal and home care aides	25	41	16	64	0.96	6.72	Short-term on-the-job training
41-1011	First-line supervisors/managers of retail sales workers	53	70	17	32	0.84	12.12	Work experience in a related field
41-2011	Cashiers, except gaming	77	76	-1	-1	0.78	7.03	Short-term on-the-job training
41-2031	Retail salespersons	49	64	15	31	0.36	13.25	Short-term on-the-job training
41-4012	Sales representatives, wholesale and manufacturing, except technical and scientific products	34	53	19	56	0.75	52.34	Moderate-term on-the-job training
41-9021	Real estate brokers	22	36	14	64	0.47	8.44	Work experience in a related field

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
41-9022	Real estate sales agents	25	40	15	60	0.49	9.88	Postsecondary vocational award
43-1011	First-line supervisors/managers of office and administrative support workers	37	45	8	22	0.88	25.76	Work experience in a related field
43-3031	Bookkeeping, accounting, and auditing clerks	47	66	19	40	0.77	19.30	Moderate-term on-the-job training
43-3071	Tellers	14	12	-2	-14	0.84	9.99	Short-term on-the-job training
43-4051	Customer service representatives	23	32	9	39	0.37	29.17	Moderate-term on-the-job training
43-4161	Human resources assistants, except payroll and timekeeping	10	11	1	10	--	--	Short-term on-the-job training
43-4171	Receptionists and information clerks	22	31	9	41	0.71	16.08	Short-term on-the-job training
43-5052	Postal service mail carriers	13	13	0	0	1.36	19.59	Short-term on-the-job training
43-5071	Shipping, receiving, and traffic clerks	18	20	2	11	0.85	24.52	Short-term on-the-job training
43-5081	Stock clerks and order fillers	28	31	3	11	0.55	19.54	Short-term on-the-job training
43-6011	Executive secretaries and administrative assistants	53	73	20	38	1.12	14.14	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
43-6012	Legal secretaries	11	23	12	109	1.09	15.39	Postsecondary vocational award
43-6013	Medical secretaries	18	21	3	17	1.29	10.97	Postsecondary vocational award
43-6014	Secretaries, except legal, medical, and executive	74	90	16	22	1.29	16.96	Moderate-term on-the-job training
43-9061	Office clerks, general	72	92	20	28	0.82	14.40	Short-term on-the-job training
45-1099	Supervisors, farming, fishing, and forestry workers	11	10	-1	-9	6.28	22.22	Work experience in a related field
45-2092	Farmworkers and laborers, crop, nursery, and greenhouse	36	34	-2	-6	1.88	11.94	Short-term on-the-job training
45-4022	Logging equipment operators	24	22	-2	-8	20.82	13.14	Moderate-term on-the-job training
47-1011	First-line supervisors/managers of construction trades and extraction workers	44	93	49	111	1.49	46.45	Work experience in a related field
47-2021	Brickmasons and blockmasons	11	21	10	91	2.50	33.33	Long-term on-the-job training
47-2031	Carpenters	69	138	69	100	1.46	28.92	Long-term on-the-job training
47-2061	Construction laborers	41	86	45	110	1.01	22.55	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
47-2111	Electricians	32	54	22	69	1.57	24.11	Long-term on-the-job training
47-2181	Roofers	15	33	18	120	2.94	28.70	Moderate-term on-the-job training
47-2211	Sheet metal workers	31	44	13	42	6.39	19.75	Long-term on-the-job training
47-2221	Structural iron and steel workers	10	29	19	190	5.28	43.53	Long-term on-the-job training
47-3011	Helpers, brickmasons, blockmasons, stonemasons, and tile and marble setters	12	22	10	83	6.95	20.91	Short-term on-the-job training
47-3012	Helpers, carpenters	19	42	23	121	7.16	24.08	Short-term on-the-job training
47-3013	Helpers, electricians	10	19	9	90	3.58	16.80	Short-term on-the-job training
49-1011	First-line supervisors/managers of mechanics, installers, and repairers	17	20	3	18	1.36	30.16	Work experience in a related field
49-3023	Automotive service technicians and mechanics	10	11	1	10	0.45	12.91	Postsecondary vocational award
49-9021	Heating, air conditioning, and refrigeration mechanics and installers	10	14	4	40	1.10	20.55	Long-term on-the-job training
49-9041	Industrial machinery mechanics	58	66	8	14	7.74	15.50	Long-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
49-9042	Maintenance and repair workers, general	81	94	13	16	2.10	19.39	Moderate-term on-the-job training
49-9043	Maintenance workers, machinery	10	10	0	0	--	--	Short-term on-the-job training
49-9044	Millwrights	23	33	10	43	16.64	28.11	Long-term on-the-job training
51-1011	First-line supervisors/managers of production and operating workers	46	47	1	2	2.42	25.09	Work experience in a related field
51-2092	Team assemblers	170	206	36	21	5.34	16.40	Moderate-term on-the-job training
51-4031	Cutting, punching, and press machine setters, operators, and tenders, metal and plastic	24	26	2	8	3.51	14.07	Moderate-term on-the-job training
51-6063	Textile knitting and weaving machine setters, operators, and tenders	22	21	-1	-5	22.25	15.76	Long-term on-the-job training
51-6064	Textile winding, twisting, and drawing out machine setters, operators, and tenders	47	49	2	4	41.10	13.33	Moderate-term on-the-job training
51-6091	Extruding and forming machine setters, operators, and tenders, synthetic and glass fibers	17	17	0	0	34.94	10.68	Moderate-term on-the-job training
51-7041	Sawing machine setters, operators, and tenders, wood	100	114	14	14	56.00	14.01	Moderate-term on-the-job training
51-7042	Woodworking machine setters, operators, and tenders, except sawing	34	39	5	15	12.72	13.16	Moderate-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
51-9011	Chemical equipment operators and tenders	72	26	-46	-64	49.05	16.22	Moderate-term on-the-job training
51-9051	Furnace, kiln, oven, drier, and kettle operators and tenders	25	26	1	4	35.58	7.25	Moderate-term on-the-job training
51-9061	Inspectors, testers, sorters, samplers, and weighers	24	24	0	0	1.84	13.12	Moderate-term on-the-job training
51-9121	Coating, painting, and spraying machine setters, operators, and tenders	12	12	0	0	3.99	14.59	Moderate-term on-the-job training
51-9198	Helpers--Production workers	20	21	1	5	1.41	9.31	Short-term on-the-job training
53-3022	Bus drivers, school	19	22	3	16	1.46	7.35	Short-term on-the-job training
53-3031	Driver/sales workers	16	21	5	31	0.93	11.41	Short-term on-the-job training
53-3032	Truck drivers, heavy and tractor-trailer	111	132	21	19	2.10	24.17	Moderate-term on-the-job training
53-3033	Truck drivers, light or delivery services	42	57	15	36	1.30	18.07	Short-term on-the-job training
53-7051	Industrial truck and tractor operators	37	39	2	5	2.12	17.43	Short-term on-the-job training
53-7062	Laborers and freight, stock, and material movers, hand	92	107	15	16	1.40	15.93	Short-term on-the-job training

SOC Code	Description	2007 Jobs	2016 Jobs	Change	% Change	2007 National LQ	2007 Median Hourly Earnings (\$)	Typical Education & Experience Level
53-7063	Machine feeders and offbearers	27	25	-2	-7	7.25	8.33	Short-term on-the-job training
53-7064	Packers and packagers, hand	19	19	0	0	0.89	8.76	Short-term on-the-job training
53-7081	Refuse and recyclable material collectors	14	14	0	0	3.39	14.86	Short-term on-the-job training
		4,838	6,007	1,169	24		18.21	

at least
1.25 greater than \$18.21

Source: EMSI

Appendix B: Businesses by 3-Digit NAICS Codes

Allendale County								
Industry	NAICS Code	2002	2007	Average Size	Change		SC % change	US % change
					#	%		
Crop Production	111	3	4	10	1	33.3	-17.6	-9.3
Forestry and Logging	113	7	6	8	-1	-14.3	-26.0	-15.2
Specialty Trade Contractors	238	12	7	0	-5	-41.7	-6.4	12.9
Wood Product Manufacturing	321	4	3	0	-1	-25.0	-6.4	-5.7
Merchant Wholesalers, Nondurable Goods	424	5	3	0	-2	-40.0	-5.0	-3.5
Motor Vehicle and Parts Dealers	441	5	4	3	-1	-20.0	-11.6	2.2
Building Material and Garden Equipment and Supplies Dealers	444	8	2	0	-6	-75.0	-8.8	0.9
Food and Beverage Stores	445	11	8	12	-3	-27.3	-18.2	-0.5
Gasoline Stations	447	6	5	4	-1	-16.7	-2.8	-1.9
Clothing and Clothing Accessories Stores	448	3	2	0	-1	-33.3	-5.3	4.6
General Merchandise Stores	452	3	3	0	0	0.0	17.5	13.3
Miscellaneous Store Retailers	453	3	4	2	1	33.3	-23.9	-8.6
Nonstore Retailers	454	4	1	0	-3	-75.0	-17.9	11.9
Credit Intermediation and Related Activities	522	5	7	7	2	40.0	12.2	23.8
Ambulatory Health Care Services	621	6	6	21	0	0.0	7.4	13.3
Social Assistance	624	5	4	0	-1	-20.0	-5.0	29.4
Amusement, Gambling, and Recreation Industries	713	4	2	0	-2	-50.0	-14.4	12.9
Repair and Maintenance	811	8	4	0	-4	-50.0	-18.3	-0.4
Personal and Laundry Services	812	5	4	4	-1	-20.0	-2.4	7.2

growth rate exceeds both SC and US growth rates

Source: Bureau of Labor Statistics

Appendix C: Allendale County Employment by Industry Sector

Industry	NAICS code	Employment		2002-2007 Change		Location Quotient	Competitive Effect	2007 Average Annual Wage (\$)	Projected Growth
		2002	2007	#	%				
Total		3,755	3,761	6	0.2			35,358	24%

[illegible][illegible][illegible]

3 star or fewer sectors		Employment		2002-2007 Change				2007 Average Annual Wage (\$)	Projected Growth
Industry	NAICS code	2002	2007	#	%	Location Quotient	Competitive Effect		
Crop Production	111	34	40	6	18	3.33	7	18,322	
Ambulatory Health Care Services	621	115	123	8	7	1.01	-13	36,985	AA
Forestry and Logging	113	47	45	-2	-4	30.77	4	31,100	D
Motor Vehicle and Parts Dealers	441	12	13	1	8	0.31	1	30,844	BA
Miscellaneous Store Retailers	453	3	6	3	100	0.31	3	11,798	BA
Food and Beverage Stores	445	115	95	-20	-17	1.50	-19	10,177	BA
Credit Intermediation and Related Activities	522	50	52	2	4	0.81	-2	33,741	BA
Gasoline Stations	447	94	20	-74	-79	1.04	-70	17,835	BA
Personal and Laundry Services	812	21	16	-5	-24	0.55	-6	13,691	BA

Methodology and Sourcing

Projected Growth Grading Scale:

AA=above average

A=average

BA=below average

D=decline

Sectors are rated on 6 factors: 2002-2007 employment growth, 2002-2007 employment growth rate, location quotient, competitive effect, average annual wage, and projected growth.

Stars are based on: 2002-2007 employment growth of 25 or more, 2002-2007 employment growth rate greater than 0.2% (overall county job growth rate), location quotient of at least 1.25, competitive effect greater than 0, average annual wage greater than \$35,358 (2007 average for all jobs in the county), and average or above average projected growth.

Location Quotient: percentage of employment in the sector in the county divided by the percentage of employment in that sector in the US; gives an indication of how concentrated employment in the sector is in the county; based on 2007 data.

Competitive Effect: based on shift-share analysis; represents the change in employment in the sector in the county after accounting for overall US employment growth and growth/decline in the sector in the US.

Source: Bureau of Labor Statistics; projections based on data from EMSI and SC Department of Commerce.



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